

Cash Management Solutions

Quick Reference Guide - Basic Navigation

Bangor
Savings Bank

You matter more.®

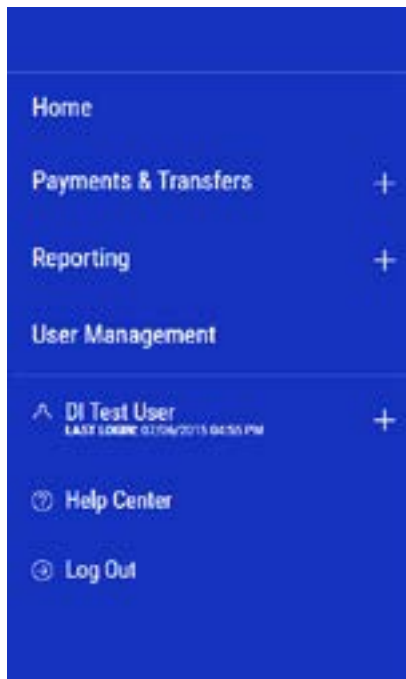
Member FDIC

MAIN MENU

Click on the 3-line icon in the upper left corner, just below your financial institution's logo to expand the side menu:



+ Indicates there are more menu selections available. Expand your user name to show user account related additional menu, including Help Center:




HOMEPAGE

Also known as the Dashboard, your landing page is a workspace. Each workspace presents various information in sections known as widgets. On the Home workspace you will find a Notification widget accompanied by a collection of other widgets based on the functionality you have been entitled to (for example: viewing account balances or initiating account transfers).

WORKSPACE

Each workspace is a page on which you will see the system default widgets relevant for that workspace (i.e. on the transfers workspace you would see a Transfers widget). Workspaces offer the ability for you to add, remove, resize, and arrange widgets to personalize the workspace to best meet your needs.



Any widgets on any workspace with a gear icon  in the upper right corner means it can be repositioned (moved), resized or deleted (removed):



To move a widget, just click on the top part of the widget being moved, then drag and drop:



WIDGET

A widget is a single focused component that presents action(s) and information with common purpose in a list view, such as view account information, place a stop payment, or make an account transfer.

While each widget focuses on different purpose, widgets have a set of standard capabilities:

- 1. Repositionable, resizable and removable as described previously under workspace for widgets with an icon.
- 2. Present sub-category of information in additional list views. + indicates there is more info to be expanded –

ACTIONS	INCOMING FILE NAME	TOTAL BATCHES	TOTAL DEBITS	TOTAL CREDITS
...	TWACHExp61324.txt	8	22,067.30	22,097.30
...	TWACHExp050024.txt	8	22,029.12	22,029.12
...	TWACHExp051624.txt	8	22,961.98	22,961.98
...	TWACHExp050224.txt	8	23,515.24	23,515.24
...	TWACHExp041824.txt	8	24,251.17	24,251.17
...	TWACHExp040424.txt	8	21,464.40	21,464.40
...	TWACHExp32124.txt	8	23,456.44	23,456.44

VIEW 1-7 OF 7

DISPLAYAD1

+ FAILED UPLOADS

- 3. Print the data you see or export all of the data in the widget within your range settings –

STOP PAYMENTS

⚙

+ Add Stop Request(s)

ALL STOP PAYMENTS

As of 06/13/2024 09:27 AM

⌵

⌵

⌵

⌵

⌵

⌵

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AACH
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ALL STOP PAYMENTS

As of 06/13/2024 09:27 AM

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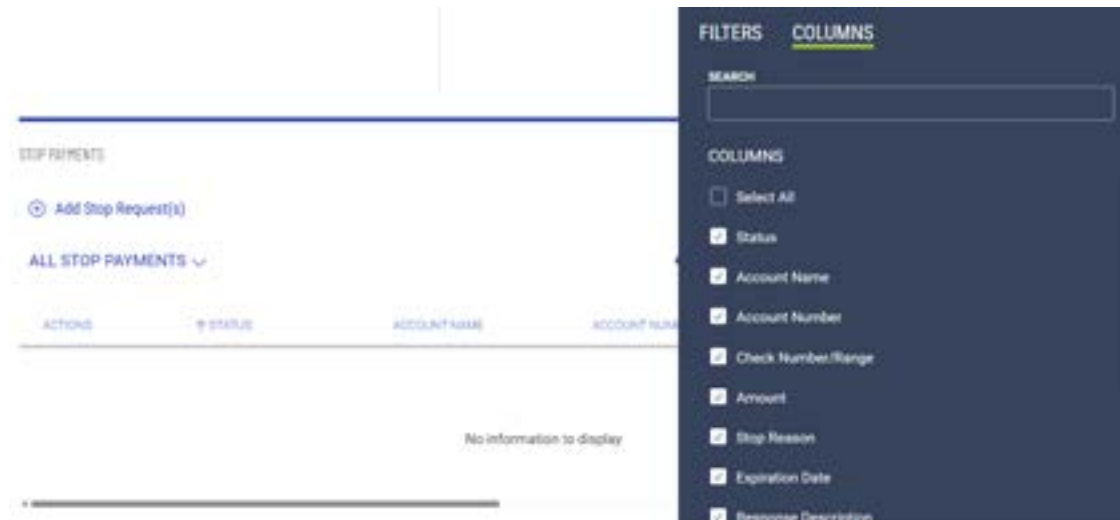
ACTIONS	↑ STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AACH
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↑ Indicates sorted column.

5. Click on column icon to arrange order of column display.



From the slide-out menu, select and deselect desired data. Drag and drop data to rearrange order.

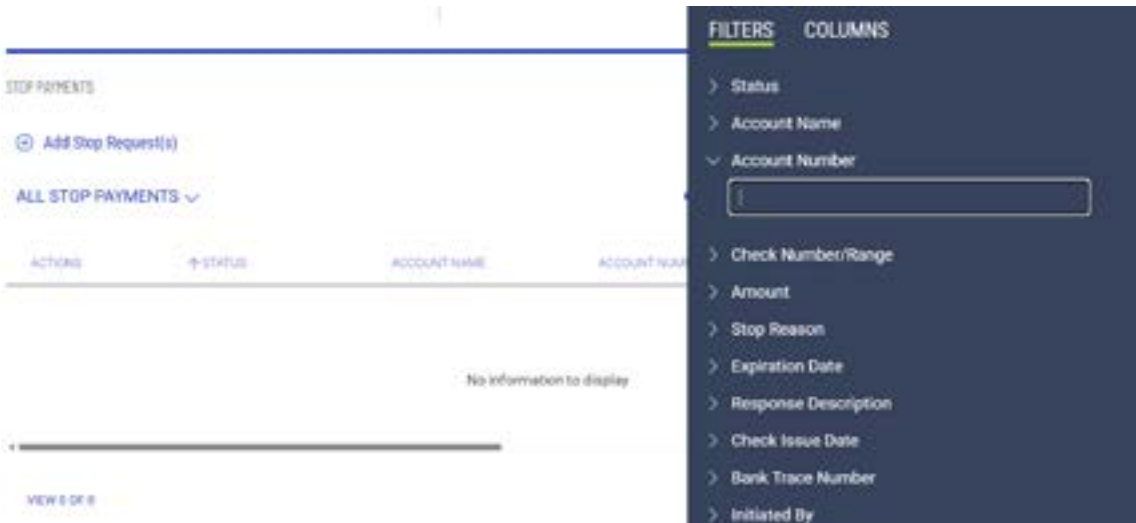


6. Click on filter icon to narrow in on specific transactions.



From the slide-out menu, select data to filter and set perimeters to zone in on the transactions

7. Save your personalized view for reuse.



When you adjust the default view by sorting a column, changing column display order, adding/removing column(s) or filtering any data, input filed automatically presents for you to save that view with a unique name.

STOP PAYMENTS ⚙️

[+ Add Stop Request\(s\)](#)

• ALL STOP PAYMENTS ▼ | Changed | Save As 🕒 As of 06/17/2024 09:34 AM 🔍 🗑️ | 🖨️ ⬇️ 🔒

FILTERS EXPIRATION DATE (T) Show Values

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT
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• ALL STOP PAYMENTS ▼ Save Cancel 🕒 As of 06/17/2024 09:34 AM 🔍 🗑️ | 🖨️ ⬇️ 🔒

FILTERS EXPIRATION DATE (T) Show Values

ACTIONS	STATUS	ACCOUNT NAME	ACCOUNT NUMBER	CHECK NUMBER/RANGE	AMOUNT
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8. Take individual or bulk action:
 - Individual action

ALL PAYMENTS ▼ 🕒 As of 06/17/2024 09:43 AM 🔍 🗑️ | 🖨️ ⬇️ 🔒

<input type="checkbox"/> ALL	ACTIONS	STATUS	PAYEE NAME	FROM ACCOUNT NAME	FROM ACCOUNT
<input type="checkbox"/>	⋮	Processed		OPERATING ACCOUNT	
<input type="checkbox"/>	View	Processed		OPERATING ACCOUNT	
<input type="checkbox"/>	Copy as New Payment	Processed		OPERATING ACCOUNT	

DELETE APPROVE REJECT

- Bulk action

ALL PAYMENTS ▼ 🕒 As of 06/17/2024 09:43 AM 🔍 🗑️ | 🖨️ ⬇️ 🔒

<input type="checkbox"/> ALL	ACTIONS	STATUS	PAYEE NAME	FROM ACCOUNT NAME	FROM ACCOUNT
<input checked="" type="checkbox"/>	⋮	Processed	Ron Clough	OPERATING ACCOUNT	2010068151
<input checked="" type="checkbox"/>	⋮	Processed	Ron Clough	OPERATING ACCOUNT	2010068151
<input type="checkbox"/>	⋮	Processed	Ron Clough	OPERATING ACCOUNT	2010068151

DELETE APPROVE REJECT

VIEW 1-3 OF 3 DISPLAY ALL ▼ 1